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Foreign Crops and MARKETS



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WORLD FLAXSEED PRODUCTION AT LOW LEVEL IN 1944

World production of flaxseed dropped to about 132 million bushels in 1944, after reaching an all-time high of 200 million bushels in 1943. This is the smallest outturn since 1929, when only 132.6 million bushels were produced. Countries of the Western Hemisphere, now the major producing ones, harvested crops much smaller than those of 1943. The sown acreages were smaller in the United States, Canada, and Mexico; Argentina's sown acreage, however, was about average. The small harvest in that country was attributed to the drought that prevailed throughout the planting and growing season. Uruguay's harvest was the largest since 1939. India's 1944 flaxseed crop was below normal, although it compared favorably with the 2 previous years. According to unofficial reports, European production was somewhat larger than that of pre-war years. Morocco and Egypt have about trebled their production during the past 7 years.

FLAXSEED: World production, averages 1925-1934, annual 1938-1944

COUNTRY	AVERAGE : 1925-1929:	AVERAGE : 1930-1934:	1938 :	1939 :	1940 :	1941 :	1942 :	1943 :	1944 a/
	: 1,000 : bushels	: 1,000 : bushels	: 1,000 : bushels	: 1,000 : bushels	: 1,000 : bushels	: 1,000 : bushels	: 1,000 : bushels	: 1,000 : bushels	: 1,000 : bushels
North America									
United States	20,216:	11,512:	8,032:	19,606:	30,888:	32,285:	41,053 b /	51,946:	23,527
Canada	4,558:	2,359:	1,259:	2,044:	3,049:	5,788:	14,992:	17,911:	9,668
Mexico	47:	81:	85:	153:	123:	313:	1,163:	1,145: c /	787
South America									
Argentina	73,390:	74,346:	57,002:	42,533:	67,713:	62,989:	53,067:	61,926:	33,128
Uruguay	2,240: b /	3,522:	4,427 b /	5,296:	2,171:	1,847:	1,808 b /	3,897: c /	3,937
Brazil c /	350:	500:	575:	827:	675:	650:	700:	700:	650
Europe	30,512:	35,599:	38,009:	-	-	-	-	-	-
Asia									
India d /	16,976:	17,064:	19,480:	18,640:	19,760:	18,520:	14,440: b /	16,400:	15,800
Turkey	129:	176:	335:	494:	690:	689:	394:	709: c /	660
Africa									
Morocco	446:	440:	220:	571:	605:	1,002:	1,192:	984: c /	1,000
Egypt	32:	44:	108:	104:	117:	375: b /	543: b /	311:	323
Other countries	1,819:	1,765:	4,737:	2,124:	1,518:	1,776:	1,488:	2,094:	2,204
Estimated world:									
total e /	150,715: b /	147,408:	134,269:	132,600:	159,000:	156,000:	175,000:	200,000:	132,000

Compiled from official sources and International Institute of Agriculture.

a/ Preliminary.

b/ Revised.

c/ Unofficial estimate.

d/ Officially reported production plus Indian official estimates for unreported tracts except in 1942, 1943, and 1944, when no estimates for unreported tracts were available.

e/ Includes estimates for countries for which 1939-1944 figures are not available.

Despite the short crop of 33 million bushels just harvested, Argentina still holds first place in flaxseed production and may become the largest consumer if the fuel-oil shortage continues. During the 10 years, 1925-1934, flaxseed crushings averaged less than 600,000 bushels annually; by 1942 they had reached 7 million. Total domestic consumption of about 35 million bushels of flaxseed in the crop year ended December 1, 1943, was a record. This was

due to the Government's decision to use linseed oil for fuel oil. Seed was also burned as fuel prior to August 1, 1943, when a Government decree prohibited the use of flaxseed in that form. Crushings in 1944 were larger than those of a year earlier.

Early in December the Argentine Government decided to prohibit exports of flaxseed. Although not officially reported, shipments to that time were probably under 12 million bushels, compared with 25.5 million in 1943.

On December 1, 1944, the Government announced that producers would be paid 13.00 pesos per 100 kilograms (\$0.98 per bushel) for flaxseed from the 1944 crop. This price applies to No. 2 grade flaxseed, sacked, on board cars at the Port of Buenos Aires. Purchases by the Regulating Board of Agricultural Production were to begin on December 18.

While Uruguayan flaxseed production is small in volume compared with that of Argentina, Uruguay is second in importance as a producer in Latin American countries. Production rose from 2 million bushels in 1925 to 5 million in 1930, then declined until 1939, when a record crop of 5.3 million was harvested. Production for 1944 is unofficially estimated at 3.9 million bushels. This is the only country in the Western Hemisphere reporting a harvest equal to that of 1943. A crop this size should afford an exportable surplus of 3 million bushels of seed and linseed oil in terms of seed, as annual domestic consumption averages about 650,000 bushels.

Mexican flaxseed production was smaller in 1944 than in the 2 preceding years. This was due to unfavorable growing and harvesting conditions. The reduction in acreage was due to many farmers preferring to grow wheat and rice.

Canadian flaxseed production reached the wartime crest in 1943, when 17.9 million bushels were harvested, then dropped to 9.7 million in 1944. Acreage expanded from 0.3 million acres in 1939 to 1.3 million in 1942 and nearly 3 million in 1943, then declined to 1.3 million acres in 1944. The great increase in 1942 and 1943 was in response to a patriotic appeal to producers, price inducements, including the payment of \$2.00 per acre for the diversion of land from wheat to flaxseed, and the assurance of a ready market for flaxseed while deliveries of other grains were restricted. By the spring of 1944 most of these incentives had lost their effectiveness. For the 1944 crops the minimum price for wheat was raised from \$0.90 to \$1.25 per bushel, whereas the fixed price for No. 1 flaxseed was raised only from \$2.50 to \$2.75 per bushel. Moreover, through participation certificates, wheat growers could anticipate

some additional income. The long-time-average yield for wheat is 16 bushels per acre, while the flaxseed yield is only 8 bushels. In addition, Canadian farmers have a decided preference for growing wheat.

An increase in Canadian flaxseed production is being urged in order to meet the anticipated foreign demand in 1945-46. This may not be achieved unless a greater inducement is offered than the present fixed price of \$2.75 per bushel.

Canada exported 8.4 million bushels of flaxseed during the calendar year 1943 and probably a larger volume in 1944. Farmer's marketings from the current crop totaled 6.2 million bushels during the first 4 months of the season (August-November) compared with 12.3 million during the same period in 1943. The quantity for crushing in Canada, probably about 6 million bushels, will depend on how much of Canada's expanded crushing capacity (now about 8 million bushels) is used for soybeans and other oilseeds. In any event, the exportable surplus will be smaller than that of last year.

Indian flaxseed production has ranged from 14 to 20 million bushels during the past 20 years while, in the same period, acreage has remained uniform at about 3 million acres. Flaxseed is produced chiefly for export, with the bulk of the shipments going to other British Empire countries and continental Europe. Since the outbreak of war in 1939, export demand has been confined principally to the requirements of other British possessions.

The Soviet Union is the largest producer and consumer of flaxseed in Europe. During the years 1934-1938, production averaged about 30 million bushels.

After producing a record crop of 52 million bushels of flaxseed in 1943, the United States output dropped to 24 million in 1944. Despite the sharp decline, this country still holds second place in world production and had always been first in consumption until the past 2 years when that of Argentina probably amounted to about the same. Prices have increased steadily since 1941, when this country entered the war. At that time the Minneapolis price was about \$1.80 per bushel compared with \$3.10 in December 1944.

FLAXSEED: Exports and imports, specified countries, averages 1925-1934, annual 1938-1943

COUNTRY	AVERAGE : 1925-1929	AVERAGE : 1930-1934	1938	1939	1940	1941	1942	1943 <u>a/</u>
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
EXPORTS								
Argentina	63,699:	61,763:	49,806:	46,580:	29,612:	26,168:	12,405:	25,451
India <u>b/</u>	9,442:	8,594:	11,470:	10,646:	<u>c/</u> 9,512:	<u>c/</u> 10,252:	<u>d/</u>	<u>d/</u>
Uruguay	2,084:	3,333:	2,849:	4,288:	3,991:	3,095:	<u>e/</u> 1,385:	1,481
United States	0:	0:	0:	0:	0: <u>f/</u>	44:	0:	0
Canada	2,828:	686:	13:	18:	65: <u>e/</u>	660: <u>e/</u>	3,379:	8,357
Mexico	- :	- :	0:	- :	2:	12:	12:	487
Soviet Union <u>g/</u>	778:	61:	0:	- :	- :	- :	- :	-
Lithuania	811:	405:	2,224:	406:	- :	- :	- :	-
Latvia	644:	197:	129:	- :	- :	- :	- :	-
Belgium	301:	196:	167:	173:	- :	- :	- :	-
Netherlands	208:	139:	222:	254:	- :	- :	- :	-
Other European countries :	579:	348:	29:	34:	- :	- :	- :	-
Turkey <u>g/</u>	- :	- :	28:	143:	<u>d/</u>	<u>d/</u>	<u>d/</u>	<u>d</u>
Iraq <u>g/</u>	- :	16:	146:	112:	134:	- :	- :	-
China	117:	392:	285:	177:	36:	- :	- :	-
Other countries	551:	440:	231:	- :	- :	- :	- :	-
Total	82,042:	76,570:	67,599:	- :	- :	- :	- :	-
IMPORTS								
United States	20,540:	12,611:	15,364:	16,028:	11,825:	21,122:	13,691:	10,624
Canada	568:	510:	713:	1,116:	874:	176:	<u>h/</u>	1
United Kingdom	13,439:	10,837:	11,053:	13,160:	- :	- :	- :	-
Netherlands	13,639:	13,715:	11,735:	12,201:	<u>i/</u> 1,892:	- :	- :	-
Germany	13,602:	13,366:	<u>i/</u> 6,104:	- :	- :	- :	- :	-
France	7,368:	9,377:	8,001:	6,943:	<u>i/</u> 825:	- :	- :	-
Belgium	4,052:	4,856:	3,367:	4,196:	- :	- :	- :	-
Italy	2,380:	2,540:	2,117:	- :	- :	- :	- :	-
Sweden	1,477:	1,583:	1,918:	2,205:	- :	- :	- :	-
Czechoslovakia	885:	1,002:	<u>i/</u> 688:	- :	- :	- :	- :	-
Denmark	696:	749:	664:	1,052:	478:	- :	- :	-
Spain	663:	760:	- : <u>k/</u>	178:	140:	- :	- :	-
Norway	602:	642:	827: <u>g/</u>	916:	- :	- :	- :	-
Japan	464:	487:	315:	94:	52:	- :	- :	-
Australia	957:	774:	1,294:	1,155:	- :	- :	- :	-
Other countries	2,505:	1,824:	2,191:	- :	- :	- :	- :	-
Total	83,837:	75,633:	66,351:	- :	- :	- :	- :	-

Compiled from official sources except as otherwise stated.

a/ Preliminary.b/ Foreign trade of Burma beginning April 1937 no longer included with British India.c/ April-March year. Calendar year not available.d/ Not available for publication.e/ Revised.f/ Not separately classified prior to July 1, 1941.g/ International Yearbook of Agricultural Statistics.h/ Less than 500 bushels.i/ January-March; latest available data.j/ Beginning April 1938, trade between Germany and Austria no longer reported as foreign trade in the German statistics. The same applies to trade between Germany and Sudetenland for the period October-December, 1938.k/ April-December; full year not available.

Regina H. Boyle

CANADIAN AGRICULTURAL OUTPUT IN 1944 AND PROGRAMS FOR 1945

Canadian farmers were called upon to make significant production shifts in 1945 at the annual Dominion-Provincial Conference held December 4-6, 1944, under the auspices of the Canadian Agricultural Supplies Board. Canadian agricultural output in 1944 was generally higher than in 1943, in the case of field crops, livestock products, and fruit. The greatest shift since pre-war has been in the case of livestock and livestock products. Canadian production of all livestock and products in 1944 is estimated by the Office of Foreign Agricultural Relations to have been about 60 percent above 1935-1939, while production of meat animals was more than twice that of pre-war.

Representatives of the Dominion Department of Agriculture, including the Minister, appealed to farmers to make every effort to maintain production of livestock for slaughter at approximately the high 1944 level in light of the international shortage of meats, which it was felt would continue at least through 1946. The Deputy Minister expressed the view that the international milk situation was much like that of meats in that demand would be greater than supply. A large demand might be expected for milk in such countries as the United Kingdom, the United States, and Canada, as well as for relief purposes. Accordingly, the Conference recommended that total milk output should be increased 3 percent and butter production 5 percent above 1944.

A reduction in the wheat acreage in 1945 of 8 percent was recommended, and in potatoes of 2 percent, while increases were recommended of 12 percent for oats, 10 percent for barley and soybeans, 75 percent for rapeseed, and 45 percent for sunflower seed. Flax production for seed, being dependent largely upon the price paid in the United States for imported flaxseed, was discussed at length by the Conference. It was felt that production could be substantially increased if the price of flaxseed were attractive in relation to other crops, such as wheat. Increases of 22.5 percent for tobacco and the largest of all for hay and pasture seed crops were recommended.

Production estimates for leading crops in 1944 as compared with 1943, shown in parentheses, are as follows: In million bushels, wheat 448 (285), oats 526 (482), barley 204 (216), rye 11 (7), mixed grains 53 (36), corn 12 (8), and potatoes 80 (72.6); in thousand tons, alfalfa 3,922 (3,891), hay and clover 15,537 (17,238); in thousand bushels, dried beans 1,431 (1,407), dried peas 1,488 (1,562), flaxseed 9,688 (17,911).

The output of meat in Canada in 1944 was the highest on record. Production from inspected slaughter in 1944 as compared with 1943 is estimated as follows in million pounds: bacon and pork 1,127 (949), lard 120 (100), beef 633 (503), veal 67 (63), and mutton and lamb 42 (38). Production of butter declined from 312 million pounds in 1943 to 296.5 million in 1944, while cheese production increased from 162 million pounds in 1943 to 177 million in 1944. Egg production rose from 11,084,000 cases (of 30 dozen each) to 12,500,000 cases, and production of poultry meat for the same years rose from 294 million to 332 million pounds.

Production of apples, pears, grapes, and peaches in 1944 was substantially above that of 1943, and considerably above the 1935-1939 averages. Consequently, it is estimated, on the basis of acreage and average yields, that the production of these respective fruit crops in 1945 may not be up to the 1944 level. Varying increases are estimated for the next crop of raspberries, loganberries, and strawberries. Since the strawberry crop of 1944 was only 9.5 million quarts as compared with the 1935-1939 average of 25.5 million quarts, and much below each of the other war years, the hope is that the crop in 1945 will yield about one-third more than did the last one. Slight increases in acreage are recommended for beans and corn for canning, and it is hoped that the production of fresh vegetables in the year 1945 will be maintained at about the 1944 level.

The 1945 program represents an agreement by Dominion Officials and representatives of the Provincial Departments of Agriculture on the importance of emphasis by agricultural producers upon production of the types of foodstuff deemed likely to be in short supply in 1945-46.

CANADA: Acreage and production goals for 1945

ITEM	1944 <u>a/</u> :	1945 :	1945 OF:	ITEM	1944 <u>a/</u> :	1945 :	1945 OF:
	ESTI- :	RECOM- :	1944 :		ESTI- :	RECOM- :	1944 :
	MATES :	MENDE :	Percent :		MATES :	MENDE :	Percent :
Grain and Forage Crops:	1,000 :	1,000 :	Percent :	Vegetables	1,000 :	1,000 :	Percent :
Wheat	23,284:	21,500:	92	Potatoes	534.9:	523.6:	98
Oats	14,315:	16,000:	112	Canning beans and	:	:	:
Barley	7,291:	8,038:	110	corn	- :	d/ :	-
Mixed grain	1,518:	1,518:	100	Canning tomatoes and	:	:	:
Rye	648:	500:	77	peas	- :	e/ :	-
Hay and clover	10,320:	10,300:	100	Fresh vegetables	- :	e/ :	-
Alfalfa hay	1,580:	1,600:	101	Vegetables for	:	:	:
Summerfallow	:	:	:	dehydration	- :	e/ :	-
(Prairie Provinces):	19,428:	20,000:	103	Oilseed Crops	:	:	:
Meat Animals	Number:	Number:	:	Soybeans	36:	40:	110
(Marketings)	:	:	:	Rapeseed	11:	20:	175
Hogs	8,850:	8,300:	94	Sunflower seed	17:	25:	145
Cattle	1,320:	1,420:	108	Flaxseed	1,323:	f/ :	-
Calves	698:	766:	110	Other Crops	:	:	:
Sheep and lambs	1,100:	1,138:	103	Dried beans	99.5:	125.0:	126
	Million:	Million:	:	Dried peas	83.6:	83.6:	100
Dairy Products	pounds :	pounds :	:	Husking corn	270.0:	350.0:	130
Milk (total)	17,600:	18,100:	103	Sugar Beets	58.4:	70.0:	120
Creamery butter	296:	310:	105	Tobacco - Flue-cured :	73.8:	88.9:	120
Cheddar cheese	177:	177:	100	Burley	9.4:	12.5:	133
Evaporated whole milk	175:	175:	100	Cigar leaf :	3.0:	4.5:	146
Condensed whole milk:	32:	30:	94	Dark	1.2:	1.6:	135
Whole milk powder ..:	17:	17:	100	Pipe	1.6:	1.7:	107
Skim milk powder ...:	28:	28:	100		1,000 :	1,000 :	:
	dozen :	dozen :	:	Seed Crops	pounds :	pounds :	:
Eggs and Poultry	:	:	:	Alfalfa	7,775:	15,000:	193
Eggs (total)	374,772:	397,263:	106	Alsike clover	1,400:	7,000:	500
Eggs (export)	79,930:	104,610:	131	Red clover	6,917:	10,000:	145
	1,000 :	1,000 :	:	Sweet clover	11,363:	7,000:	62
	pounds :	pounds :	:	Brome grass	10,590:	8,000:	75
Poultry meat	289,173:	292,000:	101	Crested wheat grass ..	2,365:	2,500:	106
	1,000 :	1,000 :	:	Timothy	11,154:	15,000:	134
Fruits	bushels :	bushels :	:	Other grasses	826:	1,096:	132
Apples	16,487:	14,000:	85	Vegetable and field :	:	:	:
Pears, cherries, :	:	:	:	root	- :	g/ :	-
plums, prunes	- :	b/ :	-	Miscellaneous	:	:	:
Peaches, apricots, :	:	:	:	Wool	15,128:	15,500:	102
grapes	- :	e/ :	-	Honey	36,216:	36,600:	101
Strawberries, rasp- :	:	:	:		1,000 :	1,000 :	:
berries, Logan- :	:	:	:		gallons :	gallons :	:
berries	- :	b/ :	-	Maple products	3,090:	2,720:	88
	:	:	:	Horses	- :	e/ :	-

Official sources.

a/ Preliminary.b/ Varying increases for 1945.c/ Slight decrease for 1945.d/ Slight increase for 1945.e/ Same as 1944.f/ To be announced.g/ Varying recommendations for 1945-46

Montell Ogdon

CANADIAN POTATO CROP NEARS RECORD

Current official estimates place the 1944 Canadian potato crop, including seed potatoes, at 80.4 million bushels, nearly 8 million bushels above the 72.6 million produced in 1943. And this estimate, even though it is a million bushels above the October forecast, is considered low by some provincial authorities. At this figure, the 1944 crop is a near record, largely due to high yields per acre, and is the largest since 1931. The acreage was practically the same as in 1943. Fewer new potatoes had to be imported last summer, and considerable quantities of late potatoes are being shipped to the United States. Market stability is being sought through the granting of export permits as conditions warrant. Exports of certified seed potatoes to the United States and Latin American countries also promise to be large. Shipments of Canadian seed potatoes to the United States are expected to exceed the low-duty quota of 1,500,000 bushels. Potato prices in Canada this season have been below the price ceilings persistently. Potatoes are widely grown throughout Canada, with the largest acreage in populous Quebec. The main commercial acreages, however, are found in Prince Edward Island, New Brunswick, Nova Scotia, Ontario, and in British Columbia. Potato acreages in New Brunswick and Prince Edward Island occupy about 8 percent of the total crop area, but only 1 or 2 percent of the crop land in Quebec and Ontario.

CANADA: Potato acreage yield, and production, by Provinces,
average 1935-1939, annual 1941-1944

YEAR	PRINCE EDWARD ISLAND	NOVA SCOTIA	NEW BRUNSWICK	QUEBEC	ONTARIO	MANI- TOBA	SAS- KATCHE- WAN	ALBERTA	BRITISH COLUM- BIA	TOTAL
AREA	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres
Average -	:	:	:	:	:	:	:	:	:	:
1935-1939 ..	34.7	21.2	48.3	136.0	146.6	33.4	48.5	28.8	18.4	515.9
1941	39.9	18.5	47.8	153.0	120.3	35.0	47.0	30.0	15.6	507.1
1942	37.0	20.8	50.5	157.0	122.0	29.0	46.0	28.5	15.1	505.9
1943	40.5	23.0	60.3	168.0	116.0	28.4	46.5	31.2	18.8	532.7
1944	39.0	25.0	66.9	168.9	120.0	27.8	41.6	28.7	17.0	534.9
	:	:	:	:	:	:	:	:	:	:
YIELD PER ACRE: Bushels: Bushels: Bushels: Bushels: Bushels: Bushels: Bushels: Bushels: Bushels: Bushels										
Average -	:	:	:	:	:	:	:	:	:	:
1935-1939 ..	179.9	149.4	172.3	139.2	95.4	100.0	78.9	113.6	179.3	124.8
1941	133.3	170.0	200.0	125.0	105.0	150.0	91.7	108.3	160.0	128.3
1942	220.0	200.0	225.0	115.0	97.8	136.7	148.3	158.4	166.7	141.3
1943	136.7	100.0	288.3	111.7	108.3	141.7	103.3	115.0	191.7	136.2
1944	201.7	205.0	225.0	150.0	118.3	83.3	90.0	125.0	186.7	150.3
	:	:	:	:	:	:	:	:	:	:
PRODUCTION: 1,000 bushels: 1,000 bushels: 1,000 bushels: 1,000 bushels: 1,000 bushels: 1,000 bushels: 1,000 bushels: 1,000 bushels: 1,000 bushels: 1,000 bushels										
Average -	:	:	:	:	:	:	:	:	:	:
1935-1939 ..	6,246:	3,162:	8,317:	18,942:	13,984:	3,339:	3,828:	3,273:	3,295:	64,386
1941	5,320:	3,145:	9,560:	19,125:	12,632:	5,250:	4,308:	3,250:	2,497:	65,087
1942	8,140:	4,160:	11,363:	18,055:	11,935:	3,963:	6,824:	4,513:	2,517:	71,470
1943	5,535:	2,300:	17,387:	18,760:	12,567:	4,023:	4,805:	3,588:	3,603:	72,568
1944	7,865:	5,125:	15,053:	25,335:	14,200:	2,317:	3,743:	3,589:	3,173:	80,400
	:	:	:	:	:	:	:	:	:	:

Official sources.

While the acreage devoted to potatoes is comparatively small, the farm value of

the crop is relatively much higher. In Prince Edward Island and New Brunswick, it

is estimated that potatoes provide 25 percent of the farm income. In 1943, potatoes produced 2.4 percent of the cash income from the sale of all farm products in Canada, although they occupy but 0.5 percent of the crop land.

CANADA: Seed-potato production,
1940-1944

YEAR	PRINCE EDWARD ISLAND	NEW BRUNS- WICK	OTHER PROV- INCS	TOTAL CANADA
	: 1,000 bushels	: 1,000 bushels	: 1,000 bushels	: 1,000 bushels
1940	2,100	2,614	737	5,451
1941	1,798	1,700	657	4,155
1942	1,506	1,544	420	3,470
1943	1,244	1,673	601	3,518
1944	2,602	2,222	634	5,458

Official sources.

Production of seed potatoes, largely confined to the Maritime Provinces, is again large. The 1943 production was unusually low due to a severe outbreak of "blight." Prince Edward Island, normally the source of over half of the Canadian production, has an estimated crop of 2,602,000 bushels as compared to 1,250,000 in 1943, the smallest in many years.

New Brunswick, the second most important seed-potato producer, has a reported crop of 2,222,000 bushels, which is over 500,000 bushels above the 1943 production of 1,671,500 bushels.

The total Canadian seed-potato production, other than Foundation stock, which is used for multiplication, is roughly about half Foundation A and half Certified stock. Foundation production is reported at 262,900 bushels, Foundation A at 2,349,400, and Certified at 2,845,900 bushels.

The supply of potatoes from the 1944 crop for domestic consumption and export appears to be in excess of 52 million bushels. This is considerably above the 45.4 million bushels from the 1943 crop, of which 2.5 million bushels were exported. This estimate is based upon the assumption that 10 million bushels will be reserved for planting, that 2 million bushels will be needed for dehydration and for manufacture,

and that 20 percent of the crop will be lost through shrinkage and waste. Obviously, this year a large surplus is available for domestic consumption, even though exports are greatly increased.

Exports of table potatoes just prior to the end of the United States quota year (September 14) filled the low-duty quota of 1 million bushels. After the new quota year began on September 15, exports to the United States quickly amounted to 1 million bushels and continued to mount beyond that figure even though dutiable at the full duty of 75 cents per hundredweight. The urge to move unstored potatoes before freezing weather arrived would have resulted in even greater exports except for the fact that Canada, in the face of serious objections from growers' interests, restricted the granting of export permits. Even so, more table potatoes were exported in October than are ordinarily exported in a year. The exportation of seed potatoes also started in October.

December 1 potato stocks in common and cold storage, including holdings by commercial growers, totaled 13,030,000 bushels, nearly a third larger than the 9,776,500 bushels reported a year earlier. Stocks in the Prairie Provinces and British Columbia are smaller than those of a year ago. The wet weather last summer made disease control unusually difficult, and much scab is reported at Winnipeg.

Potatoes in Eastern Canada continued to sell at prices considerably under the ceiling price. At Montreal, No. 1 grade potatoes from the Maritime area are being sold by wholesalers at \$1.67 to \$2.00 per 100-pound bag. The ceiling price there is about \$2.45 including the 10-cent seasonal increase effective during December and the 15-cent mark-up allowed to wholesale distributors. Similarly, at Vancouver, No. 1 Gems are being sold by wholesalers at \$2.45 to \$2.50 per 100 pounds. The ceiling price there is about \$2.73, including the 13-cent seasonal increase effective during December and the wholesaler's mark-up of 20 cents.

Based on report from
American Embassy, Ottawa, Canada.

GRAINS, GRAIN PRODUCTS, AND FEEDS

DOMINICAN REPUBLIC EXPECTS RECORD RICE HARVEST

Farmers of the Dominican Republic, influenced by high prices paid to producers, are harvesting the largest rice crop in the country's history. The size of the crop has not yet been estimated, but it is larger than the record production of 3,400,000 bushels (99 million pounds milled) in 1941. It is now estimated that 25 million pounds of rice are available for exportation.

Rapid strides in rice production during recent years have made it possible for the country to change from a net importer to a net exporter of rice. For several years imports were over 50 million pounds, but by 1939 they were no longer necessary, and in 1942 exports equaled 21 million pounds. Irrigation canals have been built to increase rice production, with the expectation of exporting a considerable surplus in the future. The climate in the Dominican Republic is favorable for rice cultivation.

HAITIAN RICE CROP SMALL

The 1944-45 Haitian rice crop is unofficially estimated at 375,000 bushels, which is below the poor crop of the preceding season, and compares with a record production of 588,000 bushels in 1942-43. The reduced outturn of the crop that is harvested principally from October through February may create a shortage in that Republic, and exports, if any, may be negligible.

COTTON AND OTHER FIBERS

COTTON MILL CONSUMPTION IN CANADA SHOWS FURTHER DECLINE

Consumption of cotton by Canadian mills was not expected to exceed about 400,000 bales in 1944 mostly as a result of a shortage of labor. This figure is about 10 percent less than that for 1943 and 20 percent less than in 1942, a record year. A reduc-

tion in certain types of war production did not release much labor for the cotton mills, because those released were mostly from heavy industries where the work was entirely different and average wages were considerably higher than in the cotton mills.

Canadian mills are now devoting about 20 percent of their capacity, directly and indirectly, to production of war material, as compared with about 32 percent in 1943 and nearly 50 percent in 1942. The production of goods for civilians is on a hand-to-mouth basis, and little relief is expected until late in 1945, partly because of declining mill output. This tight supply position for cotton goods, however, may be attributed in part to low cotton stocks, sufficient only for immediate needs.

The United States cotton-export program, under which Government-owned cotton is offered for export at 4 cents per pound below current market prices, has equalized the price of American and Brazilian cotton delivered in Canada. The cost of American Middling 15/16 inch cotton landed at Montreal is calculated at 19.1 cents, using March futures as a basis. Brazilian cotton of comparable quality is calculated at 19 cents. The change in price relationship has not been reflected in new purchases for importation, however, because the shortage of ocean transportation has held imports of Brazilian cotton to a very low level since the middle of 1942.

Imports of about 251,000 bales (478 pounds net) of cotton into Canada during the first 9 months of 1944 included 235,000 bales from the United States, 11,000 from Mexico, and less than 1,000 from Brazil. Imports of 299,000 bales in 1943 included 281,000 from the United States, 7,400 from Mexico, and 2,500 from Brazil.

TOBACCO

BAHIA'S TOBACCO PRODUCTION LARGER: PRICES FAVORABLE; EXPORTS INCREASE

Increased exports and high prices for leaf encouraged 1944-45 tobacco production

in the State of Bahia, Brazil. The crop, principally dark and cigar types, is now estimated at 58 million pounds, as compared with a revised estimate of the 1943-44 production of 52 million pounds. Early season estimates placed the 1944-45 outturn as high as 66 million pounds, but dry weather during the growing season reduced yields. Pre-war average production in the State during the crop years 1935-36 through 1939-40 was about 69 million pounds.

Continued heavy demands for export have raised leaf prices to growers to several times the low price of 1.5 cents per pound in 1940. Prices for the 1944-45 crop delivered at warehouses in the producing zones have ranged from 7.9 to 9.1 cents per pound, depending on the quality of the leaf. The average price for leaf from the preceding crop was 6.8 cents. The average price of tobacco delivered at Bahia for export has risen sharply also, and 1944-45 crop leaf is expected to average 10.6 cents per pound, as compared with only 7.6 cents for the preceding crop. Prices paid to farmers and export prices are both considerably above the minimum established by the Tobacco Institute, which, since June 1943 has had authority to support prices.

Exports of leaf from Bahia, principally to Spain, Argentina, and North Africa, during the first 10 months of 1944, totaled about 53 million pounds as compared with 30 million pounds during the corresponding period of 1943. Exports during the calendar year 1942 amounted to about 40 million pounds and pre-war exports, chiefly to Northern Europe, averaged about 60 million pounds annually. The outlook is promising for continued large exports during 1945, and stocks are reported to be adequate to fill the expected heavy demand.

FRUITS, VEGETABLES, AND NUTS

TURKISH FIG CROP LARGER THAN LAST YEAR

The preliminary estimate of dried-fig production for 1944 in Turkey is 36,300 short tons compared with 27,500 tons in 1943, and 19,800 tons in 1942. The estimate indicates a production 11 percent above

the 5-year (1938-1942) average of 32,800 tons and 7 percent above the 10-year 1933-1942) average of 33,900 tons.

Growing conditions in the Kucuk and Buyuk Menderes River producing centers were generally favorable during this season. The same situation prevailed in other areas. A considerable portion of the trees that were damaged by the severe frost of 1941-42 are understood to have made new growth and produced a fair yield this year. In addition, a sizable new acreage coming into bearing for the first time has contributed to this year's crop.

Harvesting condition from the standpoint of labor and weather were satisfactory, though some damage occurred due to rains in August. The extent of rain damage has not yet been ascertained. The quality is comparable with other years.

TURKEY: Estimated dried fig production,
1944 with comparisons

YEAR	PRODUCTION	YEAR	PRODUCTION
	: Short tons:		: Short tons
Average - :		: 1938	35,000
1938-1942: 32,800		: 1939	38,600
1933-1942: 33,900		: 1940	32,000
1934	32,000	: 1941	38,500
1935	34,600	: 1942	19,800
1936	37,400	: 1943 <u>a/</u> ..	27,500
1937	39,300	: 1944 <u>a/</u> ..	36,300
Official and trade sources. <u>a/</u> Preliminary.			

Trade sources report that as new-crop figs appeared on the market about 12,000 tons remained from the 1943 crop. These sources indicate also that a heavy percentage of this carry-over is unfit for export and will have to be utilized for alcohol and other industrial uses.

The market outlook is obscured this season as is the case with other Turkish export crops. The lack of heavy German compensation transactions, lack of interest in many foreign countries normally purchasing figs, and the shortage of shipping have all tended to slow transactions on the Izmir Bourse. Some hesitancy has been shown in the market because of the unsatisfactory dealings last year. Previous years of abnormal prices, due largely to the German

purchases, caused higher prices than would be tolerated by free countries, resulting in an unusually heavy carry-over and loss.

The Ministry of Commerce fixed a maximum domestic price of 32 piasters per kilogram (8 cents per pound) for average quality while on the Bourse prices are running between 30 piasters and 50 piasters per kilogram (7.5 and 12.5 cents per pound) according to grade and quality.

TOMATO PROSPECTS IN MEXICO

Tomato exports from Mexico for the 1944-45 season will probably be about the same as last year. Plantings on the West Coast are estimated at about 35,000 acres, or a decrease of 33 percent from last year. This decrease is partly offset by an increase in plantings in the State of Tamaulipas of around 7,000 acres. Moreover, adverse weather conditions destroyed the crop on a large part of the planted acreage last year.

It is estimated that there are between 6,000 and 10,000 acres of tomatoes in Tamaulipas this year compared with between 2,000 and 2,500 last year. From this acreage it is expected that 1,500 to 2,000 cars of tomatoes will be produced for export. Around 10 percent of the tomatoes from Tamaulipas are hauled to the border by truck and sold mostly in Texas. These are usually of superior quality to those moved by rail.

First shipments of tomatoes crossed the Mexican border at Nogales on November 9, and during November 142 cars crossed the border. Shipments were expected to be heavy in December because of the early maturity of the crop.

EXPORTS OF CANADIAN BEANS NOT LIKELY TO EXCEED 400,000 BUSHEL

The 1944 Canadian crop of dry beans, now estimated at 1,440,000 bushels, is not expected to provide more than 400,000 bushels for export. The area planted was larger than last year by 14,300 acres, but low yields resulted in a total production only 33,000 bushels above the comparatively small 1943 crop of 1,407,000 bushels. The low

yields were due primarily to drought in Ontario, the principal producing Province. The crop is not sufficient to take care of Canadian needs and provide the desired supply for the United Kingdom.

The 1944 goal of 150,000 acres was not obtained, and there is some doubt that the 1945 objective of 125,000 acres can be attained. Ontario is also the most important Canadian Province in corn production and has large acreages of sugar beets, wheat, oats, and other small grains, as well as hay and soybeans. These crops compete for the land, labor, and equipment of the farmers under present wartime conditions, and there is some doubt that Ontario farmers will find dry-bean prices attractive enough.

Ontario bean growers continue to receive the official price of \$2.50 per bushel for No. 1 beans, which includes a subsidy of 50 cents. In addition, they are given participation certificates, which entitle them to pro-rata share in the export price of \$3.00 per bushel. The Government had paid the subsidy, up to December 12, on 850,000 bushels. Export permits have been granted for 400,000 bushels, but it is doubtful if more than 350,000 to 375,000 bushels will be shipped.

The exportable surplus of dry beans in relation to total production is shown by the following approximate figures portraying disposition of the total crop, disregarding carry-over.

	1943	1944
	1,000 bushels	
Production	1,407	1,440
Seed requirements	75	90
Used by canners	160	160
Exports (August-July)	136	350
Net, including culls and waste	1,036	840
Imports (August-July)	38	-

The 1944 estimated per capita consumption of beans (6 pounds) could not be maintained from this supply if exports were as much as 350,000 bushels; but, the figure of 6 pounds per capita for 1944 is considerably above the 1943 figure of 4.6 and the 5-year (1935-1939) average of 3.6 pounds. The recent high level of bean consumption is thought to have been caused by short supplies of other protein foods. If supplies

of other proteins allow the return of bean consumption to pre-war levels, a larger proportion of the crop should be available for export and a total of 400,000 bushels would be in line with the size of the crop.

LIVESTOCK AND ANIMAL PRODUCTS

SMALLER LAMB CROP PROBABLE IN NEW SOUTH WALES

Present indications point to a reduction in the current season's lamb crop in New South Wales, Australia. The number of ewes mated for lambing this season was 21,070,000, a reduction of 11 percent compared with 1943-44. The number of lambs docked last season was 15,068,000, with a lambing percentage of 67.9, compared with 13,627,000 in the preceding season and a lambing percentage of 61.3. The main lambing season in New South Wales is during the months March-August.

The number of sheep and lambs on hand in New South Wales last March 31 was the

largest on record, or 56,800,000. This State had 46 percent of the total number in all Australia on that date.

AUSTRALIAN MEAT CONSUMPTION DOWN

Meat production in Australia approximated 2,240 million pounds in 1944 or roughly about 4 percent more than in 1938-39, according to a statement made by the Prime Minister in the Australian House of Representatives. Out of the total quantity produced this year, civilian consumption is estimated at 1,210 million pounds, and consumption of Australian armed forces at 278 million, making a total of 1,488 million pounds for Australia as a whole. This is a decrease of 8 percent as compared with consumption of 1,617 million pounds in 1938-39.

The Minister indicated that of the total quantity produced in 1944, 398 million pounds were allocated to the British Ministry of Food and Services and 354 million to the armed forces of the United States in the Pacific area.

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